

EXHIBIT 4  
DATE 1-5-07  
HB 72

# UNDERSTANDING NATIONAL AND STATE ISSUES IN WORKERS' COMPENSATION 2007

*WORKERS' COMPENSATION  
Educational Conference*

**January 10-11, 2007**

**Best Western Helena Great Northern**

**MONTANA**

**Department of Labor & Industry  
Employment Relations Division**

Wednesday, January 10, 2007

## SPEAKER

9:00 am ~ 9:10 am  
John Bohlinger  
Lt Governor, Montana

9:10 am ~ 10:30 am  
Juncan Ballantyne  
Senior Research Analyst  
Workers' Compensation Research Institute (WCRI)

10:45 am ~ 11:45 am  
Maggie (Maggie) Karpuk  
State Relations  
National Council of Compensation Insurers (NCCI)

1:00 pm ~ 2:45 pm  
Brent Veninga  
Senior Consultant  
Eric Anderson  
Senior Project Consultant  
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3:00 pm ~ 4:00 pm  
Jerry Keck  
Administrator  
Chris Catlett  
Safety and Health, Bureau Chief  
Erin Austin  
Workers' Compensation Analyst  
Department of Labor & Industry

4:00 pm ~ 5:00 pm  
Reception  
Sponsored by:  
AIA (American Insurance Association)  
Department of Labor & Industry  
Montana State Fund  
PCIAA-Property Casualty Insurers Association of America

## TOPIC

Welcome & Opening Remarks

Workers' Compensation  
in Montana:  
Administrative Inventory

Break 10:30 am ~ 10:45 am

Workers' Compensation  
Medical Cost Trends

Lunch 11:45 am ~ 1:00 pm

Medical Fee Schedules  
Professional Services Review, Phase I  
Inpatient Review, Phase II

Break 2:45 pm ~ 3:00 pm

Workers' Compensation Study  
Project  
Safety Culture—Reducing Injury Frequency  
Medical Costs  
Duration—Return to Work

Meet the Speakers

Thursday, January 11, 2007

## SPEAKER

9:00 am ~ 9:10 am  
John Bohlinger  
Lt Governor, Montana

9:10 am ~ 10:15 am  
David Dietz, M.D., Ph.D.  
VP, National Medical Director  
Liberty Mutual Insurance Company

10:30 am ~ 11:45 am  
John F. Burton, Jr., Ph.D.  
Professor Emeritus  
Rutgers University

1:00 pm ~ 2:00 pm  
Alan Colledge, M.D.  
Medical Director  
Utah Labor Commission

2:00 pm ~ 3:00 pm  
Doug Benner, M.D.  
Coordinator of Occupational Health,  
Kaiser Permanente

3:15 pm ~ 4:30 pm  
Doug Benner, M.D.  
Alan Colledge, M.D.  
David Dietz, M.D., Ph.D.

4:30 pm ~ 4:45 pm  
Jerry Keck

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Thursday, January 11, 2007

## TOPIC

Opening Remarks

National Trends  
in Workers' Compensation

Break 10:15 am ~ 10:30 am

The 1972 National  
Commission Recommendations  
and Montana Workers'  
Compensation Benefits

Lunch 11:45 am ~ 1:00 pm

Trends in Workman's  
Compensation—SPICE Model

Supply Side Cost Drivers  
in Workers' Compensation

Break 3:00 pm ~ 3:15 pm

Panel on Treatment &  
Utilization Guidelines

Closing Remarks & Wrap Up

# BIOGRAPHIES

## Eric Anderson

Senior Project Consultant  
Ingenix

Eric Anderson has more than 17 years in software and applications development experience with a background in market analytics. He has 8 years of health care experience and has served as technical lead for a number of health care analytics products. Eric has assisted numerous workers' compensation states on updating their facility schedules.

## Erin Austin

Workers' Compensation Analyst  
Department of Labor & Industry

Erin Austin started working for the Montana Department of Labor in 2006. He is a Workers' Compensation Analyst for the Employment Relations Division - Claims Assistance Bureau. He is responsible for research, analysis and interpretation on Montana's workers' compensation system and its cost drivers (premiums, medical benefits and wage loss benefits), along with the systems relationship and comparison to other states. He provides statistical analysis for the annual report and special projects.

Prior to state employment, Erin taught math for two years at Charles M. Russell High School in Great Falls, Montana. Erin earned a Bachelor's Degree from Johns Hopkins University, majoring in mathematics and psychology. He earned Master's Degrees in mathematics and statistics from Montana State University.

## Duncan Ballantyne

Senior Research Analyst  
Workers' Compensation Research Institute (WCRI)

As Senior Analyst with the WCRI, Mr. Ballantyne conducts administrative inventory studies that describe the performance of individual workers' compensation systems. In his 17 years with the Institute, he has authored 28 such state studies.

He has spoken widely on the topics of "Effective Benefit Delivery Systems," "Improving Administration," "Reducing Delay," and "Dispute Resolution in Workers' Compensation."

Mr. Ballantyne received a Master's Degree in business administration from the University of Michigan. Before coming to the Institute, Mr. Ballantyne was Executive Vice President of Harold Russell Associates, a consulting firm specializing in disability management.

## John Bohlinger

Lt Governor, Montana

Lt. Governor John Bohlinger has had a distinguished career in small business and public service. During his 33 years as a small businessman in Billings, Lt. Governor Bohlinger also worked for many community organizations in the area. He was a member of the Board of Directors of the Billings Chamber of Commerce, First Interstate Bank West, Yellowstone Boys and Girls Ranch, and the Billings Studio Theater. He has served as president of the Board of Directors of the Yellowstone Art Museum and president of the Billings Symphony.

A veteran of the Montana Legislature, Lt. Governor Bohlinger was elected to the first of three terms in the house in 1992, followed by a successful run for state senate. On November 2, 2004, John Bohlinger was elected Lt. Governor as running mate of Brian Schweitzer who won election as the 23rd Governor of the state of Montana.

# BIOGR

## Doug Benner, M.D.

Coordinator of Occupational Health  
Kaiser Permanente

Dr. Doug Benner is the Coordinator of Occupational Health at Kaiser Permanente and has led its occupational health program in 1975 at the Oakland Medical Center Health Service Corps as the founding Medical Director in Union City, California. Doug envisioned, developed and led the development of an integrated, multidisciplinary occupational health program built in Northern California since 1993. He was the first to lead the State Compensation Insurance Fund and Kaiser Permanente.

He is a Diplomate of the American Board of Professional Medical Management. He has been certified Independent Medical Director. Doug served as Chair of the California Medical Workers' Compensation during the reform years. He is past Chair of the Board of the Workers' Compensation Association. He has been a Consultant to the creation of Industrial Accident Boards and Co-Chairman of the House of Delegates of the American Medical Association, and as a Fellow, serves on several committees.

## John F. Burton, Jr., Ph.D.

Professor Emeritus  
Rutgers University

With 40 years in the field of workers' compensation, Dr. Burton's name is well-known to workers' compensation scholars. He is a professor at the University of Chicago, Cornell University, and the University of California, Berkeley. Dr. Burton served as the first Chairman of the National Commission on State Workmen's Compensation, the Labor and Employment Relations Association, and the board of directors of the National Academy of Social Insurance. He is the editor of the *Workers' Compensation* journal. His compensation work is reflected in an extensive list of publications co-authored over the past 35 years. Dr. Burton received his LL.B. and Ph.D. in economics from Rutgers University.



# APHIES

ware and applications development experience has 8 years of health care experience and has health care analytics products. Eric has assisted updating their facility schedules.

Department of Labor in 2006. He is a Workers' Relations Division - Claims Assistance Bureau. Interpretation on Montana's workers' compensation medical benefits and wage loss benefits), along to other states. He provides statistical analysis

for two years at Charles M. Russell High School earned Bachelor's Degree from Johns Hopkins University, earned Master's Degrees in mathematics and

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## Doug Benner, M.D.

Coordinator of Occupational Health  
Kaiser Permanente

Dr. Doug Benner is the Coordinator of Occupational Health for Northern California Kaiser Permanente and has led its occupational health services since 1982. He joined Kaiser Permanente in 1975 at the Oakland Medical Center after serving two years in the National Health Service Corps as the founding Medical Director of the Tiburcio Vasquez Medical Clinic in Union City, California. Doug envisioned, designed and implemented Kaiser Permanente's development of an integrated, multidisciplinary Occupational Health program with 31 centers built in Northern California since 1993. He was one of the key architects of the successful State Compensation Insurance Fund and Kaiser Permanente ALLIANCE.

He is a Diplomate of the American Board of Preventive Medicine, in Occupational Medicine. He has been certified Independent Medical Examiner as well as Medical Review Officer. Doug served as Chair of the California Medical Association Committees and Task Forces on Workers' Compensation during the reform years of 1986 to 1995, and is still a consultant for them. He is past Chair of the Board of the Western Occupational and Environmental Medical Association. He has been a Consultant to the Medical Committee of the International Association of Industrial Accident Boards and Commissions (IAIABC) since 1982. Doug was a member of the House of Delegates of the American College of Occupational and Environmental Medicine, and as a Fellow, serves on several of its committees.

## John F. Burton, Jr., Ph.D.

Professor Emeritus  
Rutgers University

With 40 years in the field of workers' compensation and labor relations, Dr. John Burton's name is well-known to workers' compensation professionals. In addition to professorships at the University of Chicago, Cornell University, and the New York State School of Industrial Relations and Public Policy, Dr. Burton served as professor and dean of the School of Management and Labor Relations at Rutgers University. In 1971-72, Dr. Burton chaired the National Commission on State Workmen's Compensation Laws. He also served as president of the Labor and Employment Relations Association in 2002. He is currently a member of the board of directors of the National Academy of Social Insurance, a member of the Ohio Bar, and the editor of the *Workers' Compensation Policy Review*. His lifelong interest in workers' compensation is reflected in an extensive list of publications and articles he has authored or co-authored over the past 35 years. Dr. Burton earned his Bachelor's of Science from Cornell University and his LL.B. and Ph.D. in economics from the University of Michigan.



# BIOGRAPHIES

## Chris Catlett

**Safety and Health, Bureau Chief**  
Department of Labor & Industry

Chris Catlett is the Bureau Chief of the Safety and Health Bureau of the Department of Labor & Industry. The Bureau provides service in the areas of public sector health and safety compliance, private sector health and safety consultation, mine safety compliance and health and safety training. These services are provided with the goal of preventing workplace injury and illness, improving safety culture and increasing the level of management commitment and employee involvement in the safety arena.

Chris has a background in health and safety, professional training, management, policy development, quality and audits. He has an Undergraduate Degree in business administration and a Master's Degree in environmental health/industrial hygiene from Colorado State University.

## Alan Colledge, M.D.

**Medical Director**  
Utah Labor Commission

Dr. Alan Colledge is a graduate of the University of Utah School of Physical Therapy and the Medical University of South Carolina. He is Board Certified and specializes in the prevention and non-surgical treatment of spine, occupational and musculoskeletal injuries. He is currently Medical Director for the Labor Commission of Utah, where he serves as committee chairman for Impairment Ratings, Provider Education, Physician Outcome Assessment, the Medical Fee Schedule, Functional Capacity Assessment, Utilization Review, Treatment Guidelines, Pain Committee and the Restorative Services Committees. He presents nationally and has published over 35 scientific articles and book chapters.

Dr. Colledge is a member of the Utah Medical Society, Salt Lake Medical Society, American Medical Association, Academy of Family Physicians, American Academy of Disability Evaluating Physicians, American Board of Independent Medical Examiners, the American College of Occupational Medicine, and the North American Spine Society.

## David Dietz, M.D., Ph.D.

**VP, National Medical Director, CPS**  
Liberty Mutual Insurance Company

Dr. David Dietz is responsible for medical review operations and medical policy for Liberty Mutual's workers compensation business nationwide. A graduate of the University of Miami School of Medicine, Dr. Dietz completed post-graduate training at Miami and Harvard Medical School, and has 20 years experience in managed medical care, guidelines development, healthcare outcomes evaluation and reporting, and utilization management systems in both workers compensation and group health.

Prior to joining Liberty Mutual, he worked in the private sector overseeing content development of managed care software and reporting systems that were successfully deployed at many group health and worker's compensation insurers. At Liberty Mutual, he oversees a staff of Regional Medical Directors and is also responsible for iCaseManager, Liberty's electronic clinical claims support tool, and medical training. He is board-certified in Internal Medicine and has practiced both Emergency and Internal Medicine.

# BIOGRAPHIES

## Magda (Maggie) Karpuk

**State Relations**  
National Council of Compensation Insurers (NCCI)

Maggie Karpuk is responsible for seeking and assisting regulators, legislators, and competitive worker's compensation system for insurance in California, Colorado, Nevada. NCCI in 1995, Karpuk was a territorial manager. She possesses 23 years of insurance and agency management.

## Jerry Keck

**Administrator**  
Department of Labor & Industry

Jerry Keck is the Administrator of the Employment Department of Labor and Industry. ERD related to the employer - employee relationship. Compensation Claims Assistance Bureau, the Safety Bureau, the Labor Standards Bureau also provides education and technical assistance complying with state labor laws, and provides services that do arise.

Jerry has been an employee of the Montana Department of Labor and Industry for 10 years. He has been Administrator of ERD since 1995. As Administrator, he worked as an investigator, coordinator, and Human Rights Bureau.

## Brent Veninga

**Senior Consultant**  
Ingenix

Brent Veninga has served healthcare clients and ancillary health care services organizations and has assisted over a dozen states in various reimbursement methodologies. Brent is a Senior Consultant at Ingenix.

**'Thank You'**  
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# PHIES

and Health Bureau of the Department of Labor in the areas of public sector health and safety consultation, mine safety compliance and provided with the goal of preventing work-related injury and increasing the level of management safety arena.

Professional training, management, policy development, graduate Degree in business administration and industrial hygiene from Colorado State Uni-

of Utah School of Physical Therapy and the and Certified and specializes in the prevention of occupational and musculoskeletal injuries. He is currently in Utah, where he serves as committee chair, Physician Outcome Assessment, the Assessment, Utilization Review, Treatment and Services Committees. He presents national and book chapters.

society, Salt Lake Medical Society, American Academy of Disability Evaluation, American Academy of Medical Examiners, the American College of Occupational Medicine and Spine Society.

work operations and medical policy for Liberty Mutual. A graduate of the University of Miami with graduate training at Miami and Harvard Medical School. He is responsible for medical care, guidelines development, and utilization management systems in both

private sector overseeing content development of systems that were successfully deployed at insurers. At Liberty Mutual, he oversees and is responsible for iCaseManager, Liberty's electronic case management system. He is board-certified in Internal Medicine.

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## Magda (Maggie) Karpuk

### State Relations

National Council of Compensation Insurers (NCCI)

Maggie Karpuk is responsible for seeking and obtaining approval of adequate rate levels and assisting regulators, legislators, and consumer groups in developing a viable and competitive worker's compensation system for insurance companies writing worker's compensation insurance in California, Colorado, Nevada, New Mexico and Utah. Prior to joining NCCI in 1995, Karpuk was a territorial manager with CIGNA Property and Casualty Companies. She possesses 23 years of insurance industry experience in underwriting, marketing and agency management.

## Jerry Keck

### Administrator

Department of Labor & Industry

Jerry Keck is the Administrator of the Employment Relations Division (ERD) of the Montana Department of Labor and Industry. ERD provides a wide variety of services and regulation related to the employer - employee relationship. The Division includes the Workers' Compensation Claims Assistance Bureau, the Workers' Compensation Regulation Bureau, the Safety Bureau, the Labor Standards Bureau, and the Human Rights Bureau. The Division also provides education and technical assistance to employers in understanding and complying with state labor laws, and provides informal investigations and mediation of disputes that do arise.

Jerry has been an employee of the Montana Department of Labor and Industry for 24 years. He has been Administrator of ERD since October 1998. Prior to being appointed as Administrator, he worked as an investigator, compliance supervisor and bureau chief in the Human Rights Bureau.

## Brent Veninga

### Senior Consultant

Ingenix

Brent Veninga has served healthcare clients for over 13 years in the hospital, clinic and ancillary health care services organizations and has an extensive financial background. Brent has assisted over a dozen states in various capacities with their workers' compensation reimbursement methodologies. Brent leads the Benchmarking Services division at Ingenix.

**'Thank You' for attending  
the conference!**



**For more information and project details,  
please visit our website:**

<http://erd.dli.mt.gov/wcstudyproject/wcstudyproject.asp>

### **Continuing Education Credits**

**Continuing Legal Education (CLE) Credits:**

11 Credits Approved

**Renewal Units (CEU) through Office of Public Instruction:**

13 Credits Approved

**Montana Insurance Continuing Education Credits:**

Applied for.

**Commission on Rehabilitation Counselor Certification (CRCC):**

11 Credits Approved

**Certified Disability Management Specialists Certification (CDMSC):**

11 Credits Approved

**Certified Case Manager Certification (CCMC):**

11 Credits Approved